

# Will Worksheet

## Background Information

1. Full Name: \_\_\_\_\_  
First Middle Last
2. Command: \_\_\_\_\_
3. Phone: ( ) \_\_\_\_\_ | ( ) \_\_\_\_\_  
Work Phone Home Phone
4. Military Status: ☐ Active Duty \* ☐ Dependent of Active Duty  
☐ Reserve \* ☐ Dependent of Retired  
☐ Retired ☐ Other  
\* Please provide rank: \_\_\_\_\_
5. Are You: ☐ Male ☐ Female
6. Marital Status: ☐ Single ☐ Separated  
☐ Married ☐ Widowed  
☐ Divorced ☐ Other
7. Spouse's Full Name: \_\_\_\_\_  
First Middle Last
8. Is the estimated value of your taxable estate (taxable estate includes life insurance proceeds, real estate, investments and all personal property) over \$600,000? Yes ☐ No ☐
9. Is the estimated value of your spouse's taxable estate over \$600,000? Yes ☐ No ☐
10. What is the total of lines 8 and 9? (select one)  
☐ Under \$500,000  
☐ Between \$500,000 and \$1,000,000  
☐ Over \$1,000,000  
☐ Over \$2,000,000

~\* Note: If you and your spouse's total combined taxable estate exceeds \$500,000 you should consult with an attorney before completing this form.

11. Children: List all children, including adopted and step-children:
- | Full Name | Relationship Code<br>(as below) | Sex   | Age   |
|-----------|---------------------------------|-------|-------|
| _____     | _____                           | _____ | _____ |
| _____     | _____                           | _____ | _____ |
| _____     | _____                           | _____ | _____ |
| _____     | _____                           | _____ | _____ |
| _____     | _____                           | _____ | _____ |

### Relationship Codes:

Your natural child by present spouse	PM
Your natural child by some else	FM
Your spouse's child, but not yours	SC
A child you have adopted	A

## Legal Residence

### 12. State of Legal Residence: \_\_\_\_\_

Note: A married couple living together as husband and wife frequently have the same legal residence. Additionally, we cannot prepare a will for the State of Louisiana or any of the Territories such as Guam.

## Executor

13. Do you want your spouse to be your Executor? Yes ☐ No ☐  
a. If No, or if not married, whom do you want to act as Executor:

Name (First, Middle, (maiden), Last)	Relationship
--------------------------------------	--------------

b. Who is your second choice as Executor?

Name (First, Middle, (maiden), Last)	Relationship
--------------------------------------	--------------

14. Are they to serve as co-executor? Yes ☐ No ☐

## Guardianship

15. List the name(s) of the other natural (or adoptive) parent(s) of your child(ren):

a. \_\_\_\_\_  
Other Parent's Name (First, Middle, (maiden), Last)

\_\_\_\_\_

Full Name(s) of Child(ren)

b. \_\_\_\_\_  
Other Parent's Name (First, Middle, (maiden), Last)

\_\_\_\_\_

Full Name(s) of Child(ren)

16. Do you want the natural (or adoptive) parent to raise your child(ren) when you die?  
Yes ☐ No ☐

Warning: A child's surviving natural or adoptive parent is given preference in most custody disputes. Nomination of a person other than the surviving parent is not binding on the court and may promote a custody battle between the surviving parent and the person nominated.

17. If the other parent can't or won't raise your child(ren), or you do not want the other parent to raise your child(ren), who would you want to do it?

Guardian: \_\_\_\_\_  
Name (First, Middle, (maiden), Last) Relationship

Alternate: \_\_\_\_\_  
Name (First, Middle, (maiden), Last) Relationship

17. Are they to serve as co-guardians? Yes ☐ No ☐

## Disposition of Property

18. Do you wish to disinherit your spouse to the extent permitted under your state's law?  
Yes ☐ No ☐

19. Do you want to make a specific bequest? Yes ☐ No ☐

Item: \_\_\_\_\_

Beneficiary: \_\_\_\_\_  
Name (First, Middle, (maiden), Last) Relationship

## Residuary Estate

20. Please write a 1 " in one of the blanks to indicate who you want to receive the rest of your property (called your "residuary estate"). Put a "2" beside your second choice (if 1 " all predecease you), and a "3" besides your third choice (if 1 " and "2" all predecease you).

\_\_\_\_\_ Your Spouse

\_\_\_\_\_ Divide equally among your children (if a child dies before you, his share would go to his children, if any, or to your other children)

1. Including step-children? Yes ☐ No ☐  
2. Including future children? Yes ☐ No ☐

\_\_\_\_\_ Your parents (50% to each, or all to the survivor). If you wish to allocate different percentages please indicate the % on the lines below.

Mother's Full Name:

\_\_\_\_\_  
(First Name, Middle, (maiden), Last Name) Percentage

Father's Full Name:

\_\_\_\_\_  
(First Name, Middle, (maiden), Last Name) Percentage

\_\_\_\_\_ To one person, as follows:

\_\_\_\_\_  
Name (First Name, Middle, (maiden), Last Name) Relationship

\_\_\_\_\_  
Name (First Name, Middle, (maiden), Last Name) Relationship

\_\_\_\_\_  
Name (First Name, Middle, (maiden), Last Name) Relationship

\_\_\_\_\_ To more than one person (equal shares to each who survives you):

\_\_\_\_\_  
Name (First Name, Middle, (maiden), Last Name) Relationship

\_\_\_\_\_  
Name (First Name, Middle, (maiden), Last Name) Relationship

\_\_\_\_\_  
Name (First Name, Middle, (maiden), Last Name) Relationship

Minors as Beneficiaries: A minor's property is normally given to the minor's parent or guardian to use for the benefit of the minor. If this is not what you want you want, please discuss this with the attorney.

Unusual Dispositions of Property: If you want to do something with your property that is not listed here, please discuss your desires with the attorney.